

ALTERNATIVE PLAN SUBMITTAL SHEET

Received

School Administrative Unit Submitting Alternative Plan:

JUN 13 2008

- Portland Public Schools

Contact Information:

Maine Department of Education

Name: Jeanne Whynot-Vickers, Interim Superintendent

Address: 196 Allen Avenue

Portland, Maine 04103

Telephone: 207-874-8100

email: whynoj@portlandschools.org

Date Plan Submitted by SAU: November 29, 2007
March 25, 2008 update
June 11, 2008, revised

The intent to submit an alternative plan has been approved by the Commissioner in the approval of the Notice of Intent?

☒ YES

☐ NO

(If NO, please explain.)

Alternative Plan Cover Sheet

(Please attach Alternative Plan as Exhibit A)

Plan Requirements				
Item	Complete	In Progress	Not Yet Started	Need Assistance ¹
Plan addresses how the SAU will reorganize administrative functions, duties and noninstructional personnel so that projected expenditures of RSU in fiscal 2008-2009 for the following areas will not have an adverse impact on the instructional program.				
system administration	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
transportation	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
special education	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
facilities and maintenance	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Plan addresses how cost savings will be achieved in fiscal 2008-2009 for the above four areas.	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Parameters for Plan Development				
Enrollment meets requirements (2,500 except where circumstances justify an exception)	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
When viewed in conjunction with surrounding proposed units, may not result in one or more municipalities being denied the option to join an RSU	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Includes at least one publicly supported high school	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Consistent with policies set forth in section 1451	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No displacement of teachers	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No displacement of students	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
No closures of schools existing or operating during school year immediately preceding reorganization, except as permitted under section 1512	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Collaborative Agreements				
		Yes	No	
Does your plan currently include information/documentation on collaborative agreements? (not required, but encouraged)		<input checked="" type="checkbox"/>	<input type="checkbox"/>	

¹ Please explain what assistance you need to complete this portion of your plan, and state from whom you need assistance, on the next page.

Exceptions to 2,500 minimum
Actual number of students for which the SAU is fiscally responsible: 7040

Actual number of students for which the SAU is fiscally responsible: 7040

Exception	Exception Claimed in Plan	Documentation Provided? (Please attach as Exhibit B)	
		Yes	No
Geography	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Demographics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Economics	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Transportation	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Population Density	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Other Unique Circumstances	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Assistance Needs map

Please use this section to describe your needs for assistance and from whom you need assistance.

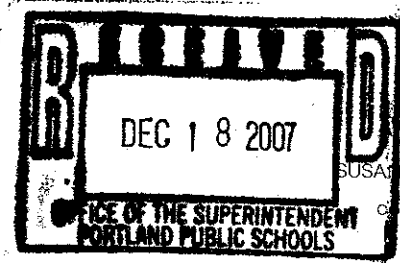
[illegible]



JOHN ELIAS BALDACCI

GOVERNOR

STATE OF MAINE
DEPARTMENT OF EDUCATION
23 STATE HOUSE STATION
AUGUSTA, MAINE
04333-0023



SUSAN A. GENDRON
COMMISSIONER

December 14, 2007

Jeanne Whynot-Vickers, Interim Superintendent
Portland School Department
196 Allen Avenue
Portland, ME 04103

Dear Superintendent Whynot-Vickers:

Thank you for the Alternative Plan that you submitted on behalf of Portland School Department on November 29, 2007 for Department review for compliance with the school reorganization law, P.L. 2007, chapter 240, Part XXXX.

I recognize how much time, effort and thoughtful work is required to complete an alternative plan and appreciate the efforts made, to date, by all those involved.

Members of my staff and I have reviewed the submission and offer the comments and notes listed below to assist you in completing the plan. If you make any substantive change(s) to any part of the plan beyond those listed below, please be sure to note those on the Updated Alternative Plan Cover Sheet Checklist, along with notation of those items that have changed per the notes contained in this response.

General Documentation (Submittal Sheet)

- Page 2 of the Alternative Plan Cover Sheet is missing; please include it with your revision even if there are no exceptions or assistance needs listed.
- The actual number of students for which the proposed RSU was fiscally responsible as of October 1, 2006 was 7,040. I am making you aware of this as this is the enrollment number that will be used in determining Essential Programs and Services funding.

Checklist/Plan Text Items

Items Checked "Complete"

With respect to the items you checked as "complete", please note the following:

** Required Items*

Please address the requirement in P.L. 2007, chapter 240, Part XXXX-36(6)(F) that "... the projected expenditures in FY 2008-2009 for system administration, transportation, special education, and facilities and maintenance will not have an adverse impact on the instructional program" by providing an assurance to that effect. Note: We will confirm this assurance against the information that was required to be submitted to the MEDMS Financial System in August, 2007.

A model for budgeting for system administration is available at www.maine.gov/education/supportingschools/planning.html.

The Department of Education will be issuing an RFP to procure routing software to be available statewide. It is the Department's intent to issue the RFP early in 2008 and have a contract signed with a vendor as soon thereafter as possible so that the software will be available to RSUs and municipalities as soon as possible. SAUs may begin to work with the system in FY 2008-2009 but will not be able to budget any cost savings until FY 2009-2010.

Items Checked "In Progress" or "Not Yet Started"

With respect to the items you checked as "in progress" or "not yet started", we are unable to complete our review until the additional information is provided. However, based on our preliminary review we would ask you to please note the following:

** Required Items*

Each alternative plan must provide projected expenditures in FY 2008-2009 for system administration, transportation, special education, and facilities and maintenance in accordance with P.L. 2007, chapter 240, Part XXXX-36(6)(F). Please provide these projected expenditures in each of the four categories; and please consider using the guidance offered in the Drummond Woodsum workshop materials.

As you know, each alternative plan must provide projected expenditures in FY 2008-2009 for system administration, transportation, special education, and facilities and maintenance in accordance with P.L. 2007, chapter 240, Part XXXX-36(6)(F). However, please ensure that the projected expenditures do not include any savings based on volunteer hours or in-kind donations.

In Exhibit A, we have included a comparison of (A) the 2007-08 EPS allocations for the four categories of system administration, transportation, special education, and facilities and maintenance and (B) your unit's 2007-08 budget information (if available) for these four categories. Also included are estimated 2008-09 EPS allocations for system administration, transportation, and facilities and maintenance. I encourage you to review this information. NOTE: If the 2007-08 budget information is missing then it is likely that your unit has not submitted this

information to the MEDMS Financial System; please see Administrative Letter # 20, dated 2/13/2007 for instructions.

We will review all items on the checklist again, upon your completion of the plan.

SUBMISSION OF REVISIONS:

Please provide the additional materials to complete your plan by February 1, 2008. Please include:

- Any additional data required
- An updated Submittal Page
- An updated Cover Sheet Checklist
- A copy of this Response from the Commissioner.

I will respond no more than 14 days after the revisions/additional materials are refiled with the Department. As you are the contact person identified on the Submittal Sheet, this response is addressed to you but with the understanding that you will share it with your school administrative unit board members.

Finally, what I am reviewing for approval is a plan (or a submission, if the plan is incomplete) which is by its very nature prospective, with steps yet to be taken or finalized; and any review comments or approval given are in relation to the elements required under P.L. 2007, chapter 240, Part XXXX but not the legality of all the activities proposed. Thus, I strongly recommend that you have your own legal advisor(s) review the details of any particular transaction proposed in your plan (particularly with respect to the disposition of property, to debt, and to employee contracts/relations) as you proceed, to ensure the legality of the steps you'll be taking to implement the plan. If that review leads to any substantive changes in any parts of your plan, please be sure to submit an amended plan to the Department for our review and our file.

Again, my sincere thanks for your efforts.

Sincerely,



Susan A. Gendron
Commissioner of Education

Enc.

cc: Bob Kautz

FY '09

Portland Public Schools

Alternative Plan Financial Review

1. 100% Essential Programs and Services

10/1/07 Enrollment	Required Local	Additional Local	ED 281 Line 60 Subsidy	Taxes and Subsidy	100% EPS	Amount Over (under) EPS
7,040	\$50,129,770	\$12,059,269	\$14,925,862	\$77,114,901	\$66,730,042	\$10,384,859

2. System Administration

FY '09 Budget	Assessment		100% EPS Total	Less Revenues	Amount Over (Under) Assessment
	K-8	9-12			
\$3,286,197	\$947,070	\$497,046	\$1,441,116	--	\$1,845,081

3. Operations and Maintenance of Facilities

FY '09 Budget	Assessment		100% EPS Total	Less Revenues	Amount Over (Under) Assessment
	K-8	9-12			
\$9,563,208	\$4,340,738	\$2,706,952	\$7,047,690	--	\$2,515,518

4. Special Education

FY '09 Budget	100 % EPS Assessment	Less Revenues	Amount Over (Under) Assessment
\$12,811,409	\$7,035,950	\$1,665,000	\$4,110,459

5. Transportation

FY '09 Budget	100 % EPS Assessment	Less Revenues	Amount Over (Under) Assessment
\$1,642,597	\$1,833,577	\$35,000	(\$225,980)

Preface

The 2008-2009 Portland Public Schools Budget of \$89.5 million was validated May 13, 2008 by a 2/3 majority of voters. That budget exceeds the 2007-08 budget by \$4.1 million. Despite many initiatives and cost-saving measures that have been taken over the past several years (illustrated in this plan), the complex nature of the students we educated and rising costs (in particular, the unprecedented rise in the cost of energy) have led to higher expenses. The new budget also includes a partial restoration of the FY07 deficit to the city's fund balance. Therefore, the 2008-09 budget does not reduce expenditures by 5% in Systems Administration, Special Education and Facilities and Maintenance (the three categories that exceed EPS) as was our goal. However, significant measures have been taken to reduce costs and many initiatives have begun which will further reduce costs in the future. **The projected expenditures in FY 2008-2009, despite these belt-tightening initiatives, will not have an adverse impact on the instructional program.**

A Snapshot of Portland

Geography

Portland is a coastal city in Cumberland County bordered by South Portland, Westbrook, and Falmouth. Its topography encompasses 26 square miles including mainland, a significant peninsula with active downtown and harbor, and several islands- two of which have year-round communities and elementary schools.

Demographics; student enrollment trends, composition and nature of community

According to the 2000 US Census, 9% of Portland residents are minorities and 7.6% are foreign born. About 10% of families speak a language other than English at home.

There are 29,714 households, 42.5% of which are homeowners (a rate considerably less than the state's rate of 71.6% home ownership). Only 22% of Portland households have children under the age of 18.

About 16% of Portland's residents are school-aged. Portland's schools currently serve 7061 students. Enrollment has decreased 5.1% since 2000, concurrent with a decrease of approximately 2% in the city's population.

The following are some facts about our 7040 students:

- 1748 (25%) are language minorities, representing 52 different languages. One third of language minority students are Somali. Portland enrolls, on average, 350 new language minority students per year.
- 1501 (21%) are Limited English Proficient
- 1036 (15%) have IEPs
- 2943 (42%) qualify for the federal Free and Reduced Lunch Program. This is significantly above the state rate of 33%.

Our district has 8 typical and 2 small-scale island elementary schools, 3 middle schools and 4 high schools (2 of which share a building) as well as one special-purpose day treatment school.

Economics

A recent state economic report stated that Greater Portland drives over 40% of the state's economy. As the major service center for this metropolitan area of 270,000 people (20% of Maine's population), the

city of Portland attracts residents in search of services. Portland's median household income is 4% lower than state average and its percentage of people living below the poverty level is 4% higher than state average. While city amenities such as a major university and art museum do provide PPS with opportunities for collaboration, the reality of city life also means that a higher concentration of children with diverse and complex needs – children in need of services - are in our schools.

School Budget

Educating a diverse student population (which is by no means typical or average in the state of Maine) costs more than EPS allocations. However local citizens support the budget as demonstrated by the passage of the first budget referendum, resulting in approval of the FY2009 budget by a two-thirds majority.

Current Collaborations

The Portland Public Schools have a long history of collaborating with the Portland community – both business and non-profit organizations. Currently 150 organizations partner with one or more Portland schools (for a full listing, see Appendix.) The district defines a partner as *a business or a non-profit organization that identifies a person to work with our staff on an ongoing basis and has shared time, money, and/or resources with a Portland public school within the last two years.* In addition, over 200 area businesses provide intermittent support, primarily in goods and services.

For example, L.L. Bean is a long-term district supporter. Their charitable giving focuses on supporting innovative strategies that enhance student achievement. From 2000 until 2003 L.L. Bean donated funds to implement student-led conferencing in Portland Public Schools. At the time, it was a new strategy that included students, teachers and parents in what had traditionally been parent/teacher conferences. Today student-led conferencing is the norm and parent involvement in those conversations has risen accordingly. Currently in Portland L. L. Bean supports classroom grants for service-learning and expeditionary learning projects and Project Aspire, a student aspirations program based upon the Quaglia Institute model.

Local non-profits also collaborate at the district level. Portland Trails, a non-profit urban land trust dedicated to building a network of multi-use trails in the Greater Portland area, partners with many of our schools to build trails in school neighborhoods and to create and implement outdoor learning venues. Their support is technical expertise (providing experts to work with teachers and students) and monetary (partnering on grant applications.) They have partnered with Longfellow Elementary School on its outdoor learning space (where poetry readings are a neighborhood event!), with East End Community School (working with students, staff and the community to design and implement natural play spaces) and with Lincoln Middle School (to create an outdoor space for both students and neighbors.).

Three years ago the Portland Public Schools established indicators to monitor community involvement – Community Involvement Indicators (for the June 2007 report, see Appendix.) The report tracks key performance indicators including the number of business and community partners, volunteer hours (both parent and community), and in-kind donations. Based upon the 86,000 volunteer hours and the U.S. Commerce Department's \$16.06 hourly volunteer rate, those volunteer hours contribute over \$1 million to our schools – and even more interesting, that's equivalent to 61 full-time, school year employees. In-kind donations totaled close to \$575,000 last year and included furniture, school supplies, copy services, cars to the vocational program, etc.

Transportation

Major traffic corridors from the West and two interstate highways heading North-South intersect in Portland. It has a major airport, the deepest port in the Northeast, rail service heading south, and a modest but efficient public bus system. The transportation corridors divide and separate the city into “dry islands” and do pose some considerations with regard to neighborhood school locations and safe walking routes to schools.

Population density

An urban center, Portland’s population density is 3, 029 per square mile – 73 times denser than the state average. Portland represents only .08% of the state’s land, but holds 5% of the state’s population. Portland’s “neighborhood” elementary and middle schools are well distributed across the city serving residential areas that are often cut off from each other by the major traffic corridors.

Changes in and Reorganization of System Administration

Several Changes in the area of System Administration, both completed and proposed, reduce expenditures considerably.

Systems Administration Personnel Reductions- completed

Since FY 2000, during the same period in which student enrollment dropped 5.1%, Portland Public Schools has decreased its System Administration ranks by 50% (see chart below). The following is a chart that illustrates the key administrative positions that existed seven years ago and those that still exist today.

Annual Savings \$372,000

FY 2000	FY2008
Superintendent	Superintendent
Asst. Supt.	Asst. Supt.
Asst. Supt.	-1
Dir. Human Resources	Dir. Human Resources
Asst. Dir. HR	-1
Dir. Educational Planning	Dir. Educational Planning
Asst. Dir. Ed. Planning	-1
Director of Finance/Operations	-1
Business Manager	currently vacant

Despite previous deep cuts in system administration, the position of Assistant Director of Human Resources, in the FY2008 budget is currently unfilled and will be cut from the FY2009 budget. It is highly unlikely that the Portland Public Schools could continue to operate without a negative impact on the instructional program should additional key administrative positions be lost. However, the following creative plans illustrate our commitment to efficiencies in the area of systems administration.

A new business manager was recently hired. One of that manager's initial charges has been to evaluate system has already been eliminated and another downgraded. The review is ongoing.

Regional Delivery of Professional Development - proposed

Beginning in the 2005 – 2006 school year, Portland Public Schools created a weekly professional development delivery system. Offerings within this system have, for the most part, been generated and facilitated by Portland's professional staff. It is important to note the success of this delivery system. During the 2006-2007 school year, approximately 700 of Portland's professional staff members participated in the weekly offerings. The feedback resulting from the weekly offerings has been overwhelmingly positive, and has led to the decision to expand the offerings to two days a week.

With the commitment of systems reduction in mind, and the success of Portland's professional development delivery method at the forefront, it is proposed that a regional professional development center be established to serve geographically appropriate School Administrative Units (SAU). Using the success of Portland's professional development delivery system as a foundation, the same system could be applied to serve the professional development needs of neighboring SAUs.

With the change in how professional development is funded by the current Essential Program and Services (EPS) formula, it is difficult to compare overall professional development costs from previous years to the current year. However, based upon past expenditures an estimate of general costs can be offered.

- ☐ Administration and clerical costs (based on percentage of time) – \$37, 800.00
- ☐ Media equipment and maintenance – \$2350.00
- ☐ Consumables - \$100.00
- ☐ Total - \$40,250.00

By creating a regionalized professional development center Portland could share the cost of delivering high-quality professional development with neighboring SAUs. Portland has already begun such as collaboration with local private schools that use some of their federal funding to pay for their staff's professional development. A regional collaboration could result in a reduction of the noted expenditures above. (See Appendix #1 for complete plan).

Estimated Annual Savings – up to \$20,000

Streamlined Business and Purchasing Methods- in process

Closing of the Warehouse

Currently Portland Public schools maintains an early 20th Century former school building, Reed School, as a central food service kitchen and bulk-purchase warehouse.

At one time, maintaining the warehouse made economic sense because the district could save considerably by making vendor agreements that allowed the purchase of school and office supplies in

bulk with the redistribution of those supplies as needed from our warehouse to the individual schools and departments. In today's business climate bulk-purchase agreements with vendors can still be made, but internet ordering and drop shipments have eliminated the need for the warehouse has an intermediate step.

The position of Warehouse Director was eliminated effective November, 2007. Closing of the warehouse at the end of this fiscal year will eliminate the need for a delivery truck. The current inventory of the warehouse is an asset valued at approximately \$500,000. During the course of this school year the assets will be sold off at cost to internal departments. Remaining inventory will be sold at a reduced price both internally and externally. Remaining assets will be written off.

Estimated Savings FY2008 \$30,000

Estimated Savings FY2009 \$60,000

Total 08 and 08 \$90,000

Possible future sale of the Reed School property

Next steps may include the construction of a more efficient Central Food Service Kitchen in conjunction with another school building under construction or renovation. The relocation of the Central Kitchen would allow for increased efficiencies of production and delivery. At that time the closure and sale of the Reed School property would be considered.

Anticipated Savings and revenue, but amount unknown

Sustainability Agreement/Management Plan for Financial Oversight

The Portland school Committee and the Portland City Council have signed a sustainability agreement which commits both parties to search for collaborative cost saving measures. Portland Public Schools has proposed a management plan for financial oversight with the Finance Department of the City of Portland that includes the sharing of budget status information monthly. City and school staff will have electronic access to both financial systems. Monthly comparisons of the budget lines to actual expenditures, and projections on significant expenditure and revenue areas will be discussed. Monthly summaries will be written and shared among cost center managers.

Although this agreement is in draft form, the actual cooperation between school and municipal finance departments has been ongoing for two months. The positive results of that cooperation serve as the basis for formalizing the relationship in a written agreement. One result of the collaboration has been a plan to modernize school purchasing practices which will include the school department joining the city in volume purchasing arrangements such as those offered by The Greater Portland Council of Governments.

Future savings and efficiencies

Regional Collaboration – Expeditionary Learning/Outward Bound High School (Casco Bay High School) - proposed

The Portland Public Schools Has proposed collaboration with the five Cumberland County schools now sending students to Portland Arts and Technology High School. PPS has proposed that schools already sending buses to PATHS could enroll ten students at Casco Bay High School (which shares a facility with PATHS) under waiver. Those students could be added to CBHS enrollment with no additional staff needed and at no additional transportation cost to the sending district. The possibility of a grant to support a regionalization initiative has come to our attention.

Additional revenue approx. \$20,000

Changes In and Reorganization Of Transportation

School Bus Magazine nationally recognized the Transportation Services of the Portland in October 2002 as one of the "50 Great Fleets Across America." Transportation Services operates twenty-seven vehicles of all shapes, sizes, and configurations. Carrying 2,300 students on 191 bus routes daily produces approximately 805,000 "to and from" school trips annually. Athletic trips and field trips will add an additional 250,000 trips per year. Vehicle mileage will approach 400,000 miles for the current school year. Routes are not limited to Portland, as we currently transport students to outside schools in Auburn, Pownal, Saco, South Portland, and Falmouth. Transportation Services operates year round, providing necessary services for all summer programs.

While not the largest school bus fleet in the state, the operation is the most technically challenging. Programming Portland such as ELL, Many Rivers, and school of choice, plus an ever increasing special education population has forced creation of a system of "combination" runs, seen no where else in Maine. To keep labor costs and vehicle expenses low; two, three, and sometimes four schools (with as many different programs) are assigned to one bus, rather than multiple buses. Portland also takes advantage of its' route length and times to create multiple tiers with as many as six a.m. routes per driver, as opposed to two or three in many transportation operations.

In 1996 Transportation Services became the first school bus organization to purchase software specifically designed for the school bus industry. In the years since it has been an invaluable asset. Used for planning, scheduling, student demographics, redistricting, and routing, it has proved its' worth many times over. The DOE recently recognized the department as being so technologically savvy; it requested our help to write specifications for transportation software being offered by the state to newly forming school district. Most districts in Maine still do utilize this technology.

Purchase of CNG vehicles

By the end of FY2009 five of the operational fleet of 18 buses will be fueled by compressed natural gas, resulting in fuel cost savings. PPS plans to continue to purchase alternative fuel buses as vehicles are replaced.

Expected savings in fuel costs

Downsizing of staff and routes – Completed FY08

A reduction of service to several areas has resulted in the following savings:

Reduction of 3 Driver Positions
Reduction of fleet by 5 vehicles
Reduced Vehicle and labor costs

Annual Savings \$125,000

Consolidation of Vehicle Maintenance Expense with South Portland – Start Date 1/08

Portland and South Portland have engaged in a Memorandum of Understanding that consolidates the maintenance of our school bus fleets. (See Appendix for Agreement's Goals, MOU and Calculations of Savings). It is expected that this collaboration will improve the accountability for the repair maintenance of the school bus fleet; ensure the fleet meets all state inspection regulations while creating a safe environment for the transportation of students to and from school and school related activities; and will provide a repair/maintenance program that will utilize South Portland's competitive

bid process, physical plant, diagnostics equipment and technical skills to reduce repair maintenance cost. The plan will likely result in savings to the South Portland School department as well.

Estimated Year 1 Savings \$58,466.

Changes in and Reorganization of Special Education

Special Education Administration Reduction - Completed

In the

In recent years the systems administration of Special Education has been reduced by one third.

FY2000	FY2008
Director Student Support	Director Student Support
Asst Dir. Student Support	Asst. Dir Student Support
Asst. Dir. Student Support	-1

Annual Savings \$90,000

Special Education Personnel Reduction – In Process

The number of Learning Strategists positions has been reduced in FY2008 and will be further reduce in FY 2009. The Learning Strategist is a unique position that functions as a chairperson and point person for comprehensive special education activities in each building. Each school has had a learning strategist either on a half time or full-time basis. A further reduction in the number of strategists district-wide from 11.0 FTE to 6.0 FTE is proposed for FY 2009. We will continue to have discussions about the impact of this reduction and the amount of specialized functions that will fall to special educators, building administrators and school secretaries to assume.

FY 2007	FY2008	FY2009
13.7 Learning Strategists	11.2 (-2.5)	7 (-4)

Savings FY 2008 \$180,000

Anticipated Savings FY 2009 \$288,000

Total 08 and 09 \$468,000

Reorganization of Special Education Services- Proposed

Discussions with the central office team, principals, teachers and school committee members have generated several suggestions that might support the consolidation effort through regionalizing certain special education programs in the Portland Public School Department. The following are scenarios we will explore further.

Create a Regional Day Treatment Program/Open to Students from Surrounding Communities and Charge Tuition

Program description: The West Day Treatment Program provides intensive services for fifty students in grades 1 through 12 from Portland exhibiting significant behavioral and emotional difficulties. The students all have Individual Education Programs (IEP). The West Program is considered part of the continuum of services offered within the Portland Schools and is therefore not an out-of-district placement. An expanded program description is available at Appendix A. The Portland School Committee was informed of the possible expansion of the West Day Treatment Program to include tuition students from surrounding communities. This would provide a lower-cost alternative to the special purpose private schools in the area and may therefore save money for sending districts while generating modest revenue for Portland.

Scenario One: Five students from outside districts added to existing West classrooms**Costs Savings Projection:**

- The West Day Treatment Program is projected to cost \$889,796 for SY 2008-2009.
- The per student cost for Portland students is \$17,796 (includes staff salaries, staff benefits and instructional.
- Tuition charged for non-Portland students is \$22,057.
- This may reduce out-of-district costs for participating districts.

Possible net \$110,285 in revenue received through tuitions.

Cautions:

- Five additional students may create a need for additional staff (probably ed techs at \$30,000), which would reduce potential revenue. According to Peter McCormack, Director of the West Day Treatment Program, we should be able to absorb 5 students with no additional classroom staff.
- Parents become very connected to out-of-district programs and often find it difficult to allow the student's return to a public school setting.
- Legal intervention in the form of a due process hearing could cost \$30,000-\$60,000.

Scenario Two: A more aggressive expansion adding three classrooms (one at each level) and enrolling up to 18 students from outside districts**Costs Savings Projection:**

- We would add three classrooms, one at each level with a capacity of 18 - 24 students.
- Additional staff would include three teachers, a social worker and six ed techs at a cost of \$464,020.
- Tuition for students from outside Portland would be set at \$27, 891, which is lower than other day treatment programs operated by special purpose private schools.
- This may reduce out-of-district costs for participating districts.

Possible net \$36,008 in revenue received through tuitions

Cautions:

- Calculating costs based on 18 additional students uses economies of scale and keeps costs for staff at a reasonable level. We would need to seriously consider whether participation from neighboring school districts would generate 18 students.
- This program would have to be certified as a special purpose private school through the DOE. This is a time consuming process.
- There is no classroom space at West School to add 18 students.

- The West School needs extensive maintenance and some renovation (such as painting the interior, installing air conditioners and paving the parking lot).
- Parents become very connected to out-of-district programs and often find it difficult to allow the student's return to a public school setting.
- Legal intervention in the form of a due process hearing could cost \$30,000-\$60,000.
- Three more classrooms could require additional administrator, school nurse, occupational therapist, and speech/language pathologist. An additional half-time secretary may be needed to maintain records properly.

<p>Expand Programming at the West Day Treatment Program and bring Portland Students back from current out-of-district placements</p>

- The yearly tuition for one student placed out-of-district in a day treatment program for students with behavioral and emotional issues averages \$53,231. This does not include transportation.
- Bringing back three students from out-of-district placements generates a savings of \$159,695.
- An additional teacher costs \$70,000, which generates a potential savings of \$89,695
- Or, adding three ed techs at \$90,000 generates a savings of \$69,695
- This has great potential but is dependent on additional classroom space.

Could generate annual savings of \$69,000-\$89,000

Cautions:

- Adding students to West might require additional staffing beyond one teacher or three ed techs. Likely a need for more ed techs, if one assumes that students who have been placed in OOD placements have more intensive needs than "typical" West student, thus requiring more support.
- There is currently no additional classroom space at West School.
- The West School needs extended maintenance and some renovation (such as painting the interior, installing air conditioner and paving the parking lot)
- Parents become very connected to out-of-district programs and often find it difficult to allow the student's return to a public school setting.
- Legal intervention in the form of a due process hearing could cost \$30,000-\$60,000.

<p>Expand Programming in Functional Life Skills (FLS) Classes to Bring Students Back from Day Level Treatment Level Programs for Children with Autism</p>
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- The yearly tuition for a student with Autism placed in a day treatment level program (special purpose private school) averages \$77,819. This does not include transportation.
- An ed tech at \$30,000 would be hired to facilitate educational programming for each student.

Could generate annual savings of \$48,000.

Cautions:

- Parents become very connected to out-of-district programs and often find it difficult to allow the student's return to a public school setting.
- Legal intervention in the form of a due process hearing could cost \$30,000-\$60,000.
- Additional classroom space is at a premium in the accessible buildings.

In Addition, special education administrators in Cumberland County are discussing a number of collaborative initiatives. (See Appendix for details)

Changes in and Reorganization of Facilities and Maintenance

Reduction in Facilities and Maintenance Administration

Recently, Portland Public Schools reduced the systems administration of our Facilities and Maintenance department from two to one.

Annual Savings \$90,000

FY2000	FY2008
Facilities Director	Facilities Director
Facilities Engineer	-1

Reductions in Custodial and Maintenance Personnel

Recent Reductions in Custodial and Maintenance Personnel will result in an annual decrease of those salaries and benefits.

Custodial Savings Annually \$74,000

Maintenance Savings Annually \$ 81,000

Retirement of aging buildings

Several years ago, Jack School was retired and torn down. More recently, PPS retired two more aging, high-maintenance buildings (Veranda Street Central Offices and Adams School Baxter School will be torn down in the spring of 2009 and a fourth (Clifford) will be retired and re-purposed in 2011. An energy efficient LEED certified East End Community School opened in FY2007 and now serves the population that attended Adams and Jack. A new, energy efficient school, built on LEED principles and state funded, will open in 2011 for the neighborhoods of Clifford and Baxter. The replacement of aging, inefficient and high-maintenance facilities with LEED certified, efficient buildings requiring low initial maintenance should positively impact facilities and maintenance expenditures in the years to come.

Future Maintenance and energy savings expected

Facilities Task Force

The School Committee has establish a facilities task force to do an in depth assessment of school facilities with consideration of any opportunities for savings.

Anticipated Savings

Efficiencies of Two High Schools Sharing One Facility

Portland Arts and Technology High School and Casco Bay High School share the same building. The administrators of these two High Schools have collaborated to develop the following efficiencies.

Shared Staffing:

- custodial staff.
- school nurse.
- receptionist.

Annual Savings \$215,000

Shared Facilities:

- Dance studio.
- Computer Lab and Technology Center
- Health Clinic and Nurse's office.
- Common gathering spaces for students.
- Library

Obvious but unspecified savings

Professional Connections on Behalf of Students:

- PATHS-CBHS liaison team that meets monthly to review any mutual issues and to explore possible collaborations. Monthly meeting between administrative teams review macro-level issues which impact both high schools.
- A dozen CBHS students attending PATHS programs. (And there are no transportation or scheduling issues!) This number is expected to double next year.
- Our faculty are increasingly collaborating with the dance, video and welding programs. For instance, video students at PATHS are broadcasting the Candidates Forum that CBHS junior humanities students are hosting.

Elimination of future expenses

Energy and Utilities Efficiencies

Despite many cost saving measures on the part of Portland Public Schools, energy "savings" are being absorbed by higher energy costs from FY03 to FY07. The electrical rate (combination of CMP and contracted supplier) has increased over 60% and electrical consumption is down almost 8%, but we paid almost 50% more. The oil rate for #2 heating fuel has gone up over 200% and our overall consumption is down over 25%, but our costs are up over 100%. Water and sewer rates have gone up while our FY07 water and sewer costs were actually less than FY03. However, It is also prudent to note that our physical plant changed dramatically over this same period though the actual square footage was only down about 3% (1,615,846 in May 2003 versus 1,563,721 in August 2006).

To keep our battle going against energy costs that eat away at instructional programming resources, we have launched the following initiatives:

- An Electrical Energy Challenge – to all schools- has potential to educate students/staff to use electricity (especially lighting) prudently and work aggressively to remove "small" appliances from areas where they are not required. We plan to reduce consumption by 10% during the two four month "challenge periods", which would save up to \$80,000 We will reserve 10% of the savings as incentives for the schools that reduce the most to be spent on school programming.
- De-lamping, replacing exit lights with LED fixtures and aggressive efforts to reduce classroom lighting is expected to reap significant benefits at Portland High (already down about 10% from September 2006 to September 2007 - see paragraph 2 spreadsheet), but I believe it is still too early to tell. We have replaced clogged heating piping and poorly

functioning valves/controls on the heating system at Lincoln Middle School which should result in more even levels of heat, but could also provide operational savings...again, too early to tell. The City of Portland replaced lighting in the Reiche gym this summer.

- Though the gym sees extensive use year round, they can shut the lights off between classes and during breaks in scheduled activities...yet again, actual savings will need to be assessed at the end of the fiscal year.
- We are exploring establishment of each building's operational hours, scheduling events centrally, and setting heating at 68 degrees Fahrenheit (and cooling at 74 degrees Fahrenheit) This plan is expected to allow us to minimize oil consumption and hold costs in check and offset the fiscal impact that escalating fuel costs, increased electrical capacity charges and double digit percent sewer rate increases will have on our bottom line in the years ahead.
- In the recent past over 13,000 lighting fixtures have been replaced with more efficient lamps and electronic ballasts; new burners with autoflame installed at 5 school properties; Network 8000 digital controls were established throughout the system; and two new pieces of equipment installed in the central kitchen. Our square footage cost for utilities in FY06 were significantly less than counterparts across the state (see FY06 SF cost by building attached)
- The installation of grant-funded solar panels at Lincoln Middle School will reduce that school's energy costs in the coming year.

Anticipated savings

Student Involved Energy Saving Initiatives

Across the district, energy saving and "greening" initiatives, many of them involving students, have reduce energy usage and generated ideas for future action strategies. During the school year 2008, kilowatt usage was reduced by 138,000 or over 5%, translating to a savings of \$20,000.

Energy Savings \$20,000

Collaboration With Municipal Departments

Collaborations have already been ongoing in the areas of plowing and landscape maintenance. The following modes of collaboration with the city of Portland are being explored.

- Collaboration on HVAC and Boiler Maintenance. Currently the systems are maintained by a contracted service with a private business for approximately \$200,000. City staff will maintain the systems for approximately \$150,000.

Savings \$50,000

- The school and municipal departments are discussing ideas in the areas of maintenance and custodial serves for the purpose of achieving future efficiencies.
- The purchasing agreements of the city with vendors of custodial and maintenance supplies and building materials will offer the school department improved purchasing power in these areas.

Appendices

Systems Administration

DRAFT

Portland School Department Proposed Management Plan for Financial Oversight

It is an important goal of the Portland School Department to provide responsible financial management and oversight of public tax dollars, grant funds, and all other sources of revenues. The Department recognizes the importance of continued attention and review of expenditures and revenues, and also recognizes that the financial health of the City and the School Department are interrelated.

Both City and School staff have concluded that in order to provide responsible oversight, the School Department needs on-site daily financial management. It is also critical that communication between City and School staff, as well as between the City Council and the School Committee, be formalized.

The following plan outlines a structure to facilitate these goals, and ensure a collaborative business environment.

1. The Business Manager position should be filled as soon as possible, and report directly to Superintendent;
2. City and School staff will share budget status information monthly, including reconciliation of systems;
3. City and School staff will have electronic access to both financial systems;
4. School internal budget administration will include monthly comparisons of budget to actual, actual trends over three years, and projections on significant expenditure and revenue areas for the current fiscal year. Monthly summary will be written and reviewed with the Superintendent, and shared with all cost center managers. A copy will be sent to the City's Finance Director;

5. Quarterly meetings to review budget and financial status, to include City Manager, Superintendent, Business Manager, and City Finance Director;

6. Quarterly budget reports to joint Finance Committees of School and City; to include year to date analysis and summary of expenditures and revenues, highlighting areas of concern and plan for addressing them. Any action required by School Committee or City Council will be forwarded to them;

7. Budget process will begin with City and School staff discussion, to include schedule, challenges, improvements, staffing and revenue expectations;

8. City and School staff will meet together to prepare information for budget presentation, content and format.

This plan is offered as an administrative process, to be endorsed by consensus of the School Committee and then the City Council.

November 1, 2007

Regional Delivery of Professional Development - proposed

Current Professional Development Delivery

Educational theorists and writers have concluded that the one-day conference with an expert is not the most effective or efficient ways to deliver professional development. While such a delivery system is important in some instances, it does not have the greatest impact on teaching and learning. Instead, embedded professional development, created and facilitated by professional staff, has the most impact on educational practice. In addition, such professional development opportunities usually are generated from specific practitioner needs either at the school or district level.

To that end, beginning in the 2005 – 2006 school year, Portland Public Schools created a weekly professional development delivery system. Offerings within this system have, for the most part, been generated and facilitated by Portland's professional staff. It is important to note the success of this delivery system. During the 2006-2007 school year, approximately 700 of Portland's professional staff members participated in the weekly offerings. The feedback resulting from the weekly offerings has been overwhelmingly positive, and has led to the decision to expand the offerings to two days a week.

With the commitment of systems reduction in mind, and the success of Portland's professional development delivery method at the forefront, it is proposed that a regional professional development center be established to serve geographically appropriate School Administrative Units (SAU). Using the success of Portland's professional development delivery system as a foundation, the same system could be applied to serve the professional development needs of neighboring SAUs.

Resulting Reductions

With the change in how professional development is funded by the current Essential Program and Services (EPS) formula, it is difficult to compare overall professional development costs from previous years to the current year. However, based upon past expenditures an estimate of general costs can be offered.

- ☐ Administration and clerical costs (based on percentage of time) – \$37, 800.00
- ☐ Media equipment and maintenance – \$2350.00
- ☐ Consumables - \$100.00
- ☐ Total - \$40,250.00

By creating a regionalized professional development center Portland could share the cost of delivering high-quality professional development with neighboring SAUs. This collaboration could result in a reduction of the noted expenditures.

However, another viewpoint may include a consideration of how other consolidated or non-consolidated SAUs could reduce professional development costs. The current funding through EPS allows for \$40 per student to be targeted for "Implementation of a

Standards-Based System" (professional development). A regionalized professional development center would allow participating SAUs to contribute a portion of per student allocation to the regionalized center and the remainder of the allocation could be used at the discretion of the SAU.

Next Steps

In order to facilitate the process of establishing a regionalized professional development center in Portland the following next steps are proposed.

- A. Communicate intent to regional superintendents (Using Portland's CTE [PATHS] as a regional guideline.)
- B. November – December, 2007: Establish informational meetings with regional curriculum coordinators and/or staff developers
- C. January – May, 2008: Include regional curriculum coordinators and/or staff developers in mailings regarding offerings and track participation in offerings from regional professional staff, and track revenue generated from that participation.
- D. June, 2008: Reconvene regional curriculum coordinators and/or staff developers to determine if true regionalization should be pursued and meets the professional development needs of a wider community of learners.

Conclusion

With the data-informed success of Portland's professional development delivery system, it can be discerned that establishing a regionalized, and collaborative-based, professional development center in Portland would serve the needs of much larger educational population. While cost reductions could be reached, a much larger view includes establishing a true community of learners at the regional level.

Portland Public Schools Community Collaborations

The Portland Public Schools have a long history of collaborating with the Portland community – both business and non-profit organizations. Currently 150 organizations partner with one or more Portland schools (for a full listing, see Appendix.) The district defines a partner as *a business or a non-profit organization that identifies a person to work with our staff on an ongoing basis and has shared time, money, and/or resources with a Portland public school within the last two years.* In addition, over 200 area businesses provide intermittent support, primarily in goods and services.

For example, L.L. Bean is a long-term district supporter. Their charitable giving focuses on supporting innovative strategies that enhance student achievement. From 2000 until 2003 L.L. Bean donated funds to implement student-led conferencing in Portland Public Schools. At the time, it was a new strategy that included students, teachers and parents in what had traditionally been parent/teacher conferences. Today student-led conferencing is the norm and parent involvement in those conversations has risen accordingly. Currently in Portland L. L. Bean supports classroom grants for service-learning and expeditionary learning projects and Project Aspire, a student aspirations program based upon the Quaglia Institute model.

Local non-profits also collaborate at the district level. Portland Trails, a non-profit urban land trust dedicated to building a network of multi-use trails in the Greater Portland area, partners with many of our schools to build trails in school neighborhoods and to create and implement outdoor learning venues. Their support is technical expertise (providing experts to work with teachers and students) and monetary (partnering on grant applications.) They have partnered with Longfellow Elementary School on its outdoor learning space (where poetry readings are a neighborhood event!), with East End Community School (working with students, staff and the community to design and implement natural play spaces) and with Lincoln Middle School (to create an outdoor space for both students and neighbors.) – to name just three examples.

And one example of a smaller organization: the Cumberland County Federal Credit Union operates at Lyseth Elementary School where once a week students may visit their own mini credit union to make deposits and withdrawals. It's also an opportunity for students to begin learning about money management – an important life skill.

Three years ago the Portland Public Schools established indicators to monitor community involvement – Community Involvement Indicators (for the June 2007 report, see Appendix.) The report tracks key performance indicators including the number of business and community partners, volunteer hours (both parent and community), and in-kind donations. Based upon the 86,000 volunteer hours and the U.S. Commerce Department's \$16.06 hourly volunteer rate, those volunteer hours contribute over \$1 million to our schools – and even more interesting, that's equivalent to 61 full-time, school year employees. In-kind donations totaled close to \$575,000 last year and included furniture, school supplies, copy services, cars to the vocational program, etc.

**Portland Public Schools
Community and Business Partners
2007/2008**

Business/Community Partners	School
Donna's Greenhouse	Portland Arts and Technology High School
Double Tree Hotel	West School
Drummond Woodsum & MacMahon	King Middle School
East End Katering	West School
Eastland Park Hotel	Deering High School
Embassy Suites	Lincoln Middle School
First Lutheran Childcare	Portland Arts and Technology High School
Flatbread	District
Forest City Ceverolet	Portland Arts and Technology High School
Foster Grandparent Program	Lyseth Elementary School
	Riverton Elementary School
	East End Community School
	Hall Elementary School
	Presumpscot Elementary School
Francisco Restaurant	Hall Elementary School
Georgia-Pacific Corp.	Portland Arts and Technology High School
Goodwill Industries of Northern New England	Portland Arts and Technology High School
Hancock Lumber	Portland Arts and Technology High School
Have Chef Will Travel	Portland Arts and Technology High School
Hilton Garden Inn - Portland	Deering High School
Immigrant Legal Advocacy Project	Adult Ed
Inn on Carelton	Portland Arts and Technology High School
Inn on St. John Street	Portland Arts and Technology High School
JT Services	Longfellow Elementary School
Junior Achievement	Lyseth Elementary School
Keller Williams	District
Kendra Haskell Designs	Portland Arts and Technology High School
KIDS Consortium	District
L. L. Bean	District
Lachance Brick Co.	Portland Arts and Technology High School
Lanco Assembly Systems	Portland Arts and Technology High School
Law Offices of Joe Bornstein	Reiche Community School
Lee Auto Mall	Portland Arts and Technology High School
Liberty Mutual	Deering High School
Longfellow Books	Hall Elementary School
	King Middle School
Longfellow School	Portland Arts and Technology High School
Loranger Door & Window Inc.	Portland Arts and Technology High School
Lunt School	Portland Arts and Technology High School
Maine Arts Commission	District
Maine Audubon	District
	Portland Arts and Technology High School Reiche Community School

**Portland Public Schools
Community and Business Partners
2007/2008**

Business/Community Partners	School
Advantage Gases	Portland Arts and Technology High School
American Steele/Aluminum	Portland Arts and Technology High School
American Tool Co.	Portland Arts and Technology High School
Americorps VISTA	District
Applicators Sales & Service	Portland Arts and Technology High School
B J's Wholesale Club	Riverton Elementary School
Bangor Savings	Hall Elementary School
Bath Savings Institution	Lyseth Elementary School
Berry Dunn McNeil and Parker	Portland High School
	Deering High School
Big Brothers/Big Sisters	Portland High School
BJ's Wholesale Club	East End Community School
Blunt Youth Radio c/o WMPG / University of Southern Maine	YOUTHINK
Bob Bettencourt	Portland Arts and Technology High School
Bob the Screenprinter	Portland Arts and Technology High School
Brockway-Smith Co.	Portland Arts and Technology High School
Busy Bee Child Care	Portland Arts and Technology High School
Cardente Real Estate	Longfellow Elementary School
Carelton Inn Bed & Breakfast	Portland Arts and Technology High School
CBRE/ The Boulos Company	Longfellow Elementary School
Center for Cultural Exchange	Reiche Community School
Central Maine Power	Reiche Community School
Channel 8	Portland Arts and Technology High School
Charles S. Chase Co.	Portland Arts and Technology High School
	District
Cheverus	Reiche Community School
Children Odyssey	Portland Arts and Technology High School
Childrens Museum	East End Community School
City of Portland	Portland High School
ClubZ-Inhome Tutoring Services	Deering High School
Coffee by Design	Presumpscot Elementary School
Communication Technologies, Inc.	Portland Arts and Technology High School
Community Dental Health Center	Portland Arts and Technology High School
Concrete Prescriptions, LLC	Portland Arts and Technology High School
cPort Credit Union	Riverton Elementary School
Creighton and Sons	Portland Arts and Technology High School
Cumberland Avenue Garage	Portland Arts and Technology High School
Cumberland County Federal Credit Union	Lyseth Elementary School
D&G Machine Co.	Portland Arts and Technology High School
DiMillo's Floating Restaurant	District
Discount Tire - So. Portland	Portland Arts and Technology High School
Domino's Pizza	YOUTHINK

**Portland Public Schools
Community and Business Partners
2007/2008**

Business/Community Partners	School
Maine College of Art	West School
Maine Fire Training SMCC	Portland Arts and Technology High School
Maine Masonry Company	Portland Arts and Technology High School
Maine Medical Center	Portland Arts and Technology High School Portland High School
Maine Metal Products Assn.	Portland Arts and Technology High School
Maine Oxy-Acetylene Supply Co	Portland Arts and Technology High School
Maine Software Developers	Portland Arts and Technology High School
Maine Songwriters Association	Portland Arts and Technology High School
Mainely Trusses	Portland Arts and Technology High School
Margarita's Restaurant	Nathan Clifford Elementary School
Memorial School	Portland Arts and Technology High School
Metro	District
Napa Auto Parts	Portland Arts and Technology High School
National Service-Learning Partnership	YOUTHINK
New Dance Studio	Portland Arts and Technology High School
New England Transmission	Portland Arts and Technology High School
Nichols Portland	Portland Arts and Technology High School
North Deering Veterinary Hospital	Lyman Moore Middle School
Norton Lamb and Company	District
Oakhurst Dairy	West School
O'Connor Motor Company	Portland Arts and Technology High School
Odat Machine	Portland Arts and Technology High School
O'Natural's	District
Pape Chevrolet	Portland Arts and Technology High School
Paradigm Window Solutions	Portland Arts and Technology High School
Paul White Tile	Nathan Clifford Elementary School
PCA Great Performance	Longfellow Elementary School
Pierce Atwood	Longfellow Elementary School
Portland Express Water Taxi	Peaks Elementary School
Portland Parks and Recreation	District
Portland Pirates	Casco Bay High School Nathan Clifford Elementary School Hall Elementary School
Portland Police Department	Longfellow Elementary School
Portland Press Herald/Maine Sunday Telegram	Portland High School
Portland Public Works	Lincoln Middle School
Portland Regional Chamber	District
Portland Rotary Club	Portland Arts and Technology High School
Portland Sea Dogs	West School
Portland Trails	District
Portland Valve	Portland Arts and Technology High School

**Portland Public Schools
Community and Business Partners
2007/2008**

Business/Community Partners	School
	District
Portland Water District	Riverton Elementary School
Portland Welding Supply	Portland Arts and Technology High School
Portland West Even Start	District
Primary Steel	Portland Arts and Technology High School
Project Staffing Inc.	Portland Arts and Technology High School
Risbara's Greenhouse	Longfellow Elementary School
Rowe Ford	Portland Arts and Technology High School
	Hall Elementary School
	Presumpscot Elementary School
RSVP	Lyseth Elementary School
Saturn of Westbrook	Portland Arts and Technology High School
Shaw's Northgate	Lyseth Elementary School
Shoes That Fit	Reiche Community School
SMCC Early Childhood Education	Portland Arts and Technology High School
Southern Maine Community College	District
Spectrum Supply Company	Portland Arts and Technology High School
Starbucks - Northgate	Hall Elementary School
The Baron Center	Portland Arts and Technology High School
The George Mitchell Institute	District
The Law Offices of Joe Bornstein	Reiche Community School
UBS Financial Services	Longfellow Elementary School
United Way of Greater Portland	District
University Credit Union	Nathan Clifford Elementary School
University of Southern Maine	Nathan Clifford Elementary School
Unum	District
	Lyseth Elementary School
US Postal Service Portland	Riverton Elementary School
Verrill Dana, LLP	Lincoln Middle School
Walch Publishing	Portland High School
Washington Gardens	Presumpscot Elementary School
Waynflete	Reiche Community School
Wells Fargo	Portland High School
WGME 13	Portland Arts and Technology High School
Whimsy	Portland Arts and Technology High School
Willisten West	Reiche Community School
Words at Work	Lyman Moore Middle School
	Adult Ed
Xpress Copy	King Middle School
Yankee Ford	Portland Arts and Technology High School

Portland Education Partnership
Community Involvement Indicators
June 2007

School	Enrollment	# Partners	# of Volunteers	Total Volunteer Hours	Total Inkind	*External Grants \$	**Total PEP Grants \$
East End	441	3	133	4,130	\$14,259	\$18,900	\$2,600
N. Clifford	263	5	91	5,285	\$900	\$850	\$0
Hall	441	7	176	3,053	\$26,364	\$500	\$875
Longfellow	345	8	284	9,302	\$81,221	\$1,200	\$250
Lyseth	544	8	333	9,200	\$15,776	\$7,900	\$2,350
Peaks Isl./Cliff	48	1	39	700	\$10,297	\$10,455	\$0
Presumpscot	241	4	145	1,999	***		\$400
Reiche	310	8	4	4,791	\$22,985	\$9,500	\$600
Riverton	434	4	152	6,496	\$13,145	\$500	\$1,900
King	501	3	134	874	\$6,631	\$0	\$3,576
Lincoln	449	3	263	8,200	\$62,685	\$7,606	\$2,610
Moore	550	1	307	2,800	\$12,905	\$1,000	\$3,100
Portland High	1,085	8	125	5,800	\$116,899	\$53,300	\$0
Deering	1,249	5	247	14,500	\$69,090	\$200	\$700
PATHS	545	64	12	1,100	\$74,638	\$0	\$6,315
West	46	5	7	875	\$3,100	\$3,740	\$600
Casco Bay	169	0	68	600	\$16,690	\$15,500	\$5,950
Total	7661	137	2520	79,705	\$547,585	\$131,151	\$31,826
Adult Ed	6,000	2	120	6,300	\$26,960	\$11,000	

*School based grants through external sources - i.e. Target, Lowe's, etc.

**School based grants facilitated through the Portland Education Partnership office - i. e. Arts in Education

Appendices

Transportation

IMPLEMENTATION OF COLLABORATIVE AGREEMENT FOR SCHOOL BUS REPAIR MAINTENANCE BETWEEN PORTLAND SCHOOLS AND SOUTH PORTLAND SCHOOL DEPARTMENT

Whereas Portland Schools and South Portland School Department have demonstrated commitment and vision that resulted in the success of our collaboration for transportation of our students, we submit this repair maintenance agreement to further that collaborative initiative.

- **Administration:** South Portland School Department will have and provide full management responsibilities of the PMCS (Preventative Maintenance Checks and Services) and Repair Maintenance Programs for Portland Schools specified school bus fleet. This will include but is not limited to scheduling of technicians repair maintenance work, approving work orders and purchasing of parts, data collection, provide reports and records which may be reasonably requested, conduct technician evaluations, administer training as needed and keep Portland administration informed of the operational status of their school bus fleet. This service will be provided by a cost per hour rate.
- **Staffing:** South Portland School Department will hire one and one half (1.5) repair maintenance technicians to support the added PMCS and Repair Maintenance Programs. Portland currently has 21 school bus units for consideration with this collaborative agreement. These technicians will be employees of South Portland School Department. South Portland School Department will be responsible for payroll, payroll deductions, and any other administrative items related to being an employee of South Portland School Department. South Portland School Department reserves the right to reevaluate the technician to bus ratio with Portland Schools if repair maintenance demand requires it. This service will be provided by a cost per hour rate.
- **Technician Training:** The operation of a repair maintenance program is expensive and inevitable. Technician training is a paramount component of an efficient and cost conscious program. Technicians will be required to periodically improve their professional growth by attending training workshops as required by South Portland School Department.
- **Driver Training:** Management recognizes for an efficient, cost conscious and accountable Repair Maintenance Program it is essential to establish a driver training program that demonstrates a comprehensive knowledge of the tasks being performed related to the Repair Maintenance Program. These programs include but are not limited to: Pre-Trip and Post-Trip inspections, identifying and understanding potential mechanical issues, and proper driving techniques to ensure the longevity of the school bus unit. Drivers from Portland Schools will participate periodically in training workshops as required by South Portland School Department and agreed upon by Portland Schools Transportation Administration. Portland Schools will be responsible for the cost related to training for their drivers.
- **Physical Plant Insurance:** Portland Schools will name South Portland School Department on their property and casualty insurance policy.
- **Parts:** Parts purchased by South Portland School Department for Portland Schools bus fleet will be at cost. Invoicing for parts will come directly from South Portland School Department. Those invoices will be transferred to Portland Schools by means determined by both parties. South Portland School Department will notify Portland Schools Transportation Administration when a specific part over \$1,000 needs to be ordered.

- **Bidding:** A competitive bid process is a key element for any Repair Maintenance Program to control cost while increasing accountability. By increasing the volume of the item needed it levies that increased volume for more aggressive competitive bidding. Portland Schools will be included in the competitive bid process of South Portland School Department. This bidding process will follow all established South Portland School Department policies.
- **Contracted Services:** With a Repair Maintenance Program there are times that certain repairs will be contracted to outside vendors because of their specialized technical skills. Portland Schools understand that South Portland will contract to outside vendors when determined that in house resources are not available.
- **Emergency Response:** South Portland School Department will provide a mutual aid list of contacts and telephone numbers to Portland drivers to utilize for possible emergency breakdowns on trips. South Portland School Department will also provide a list of response staff and telephone numbers for possible emergency breakdowns.
- **Diagnostics Equipment/Software:** With a repair maintenance program it is critical for the overall efficiency and productivity of the program to periodically purchase diagnostic equipment and software. With these purchases it ensures the technicians are more efficient in conducting their daily tasks which has a direct relation to repair maintenance cost savings. If diagnostic equipment and software need to be purchased that can be universally used by both school bus fleets then Portland Schools will be responsible for 50% of that cost. If diagnostic equipment and software need to be purchased that is specific to Portland school bus fleet then Portland Schools will be responsible for 100% of that cost. South Portland School Department will inform Portland Schools by December 1st of any anticipated purchase of diagnostic equipment and software to support their budget building process.
- **Capital Outlay:** In some collaborative initiatives it is necessary to purchase specialized equipment to support the program goals. In order to establish an efficient, cost effective and accountable Repair Maintenance Program Portland Schools will purchase specific specialized shop equipment before the implementation of this agreement. This is a one time capital outlay expense. All specialized shop equipment purchased by Portland Schools will remain the property of Portland Schools if the collaborative agreement is terminated. Total capital outlay cost is \$28,957.00.
- **Time of Payment:** Portland Schools will pay South Portland School Department within thirty (30) days of receiving an invoice.
- **Term of Agreement:** This agreement shall commence and take effect on January 1, 2008, and end on June 30th, 2008. Any further agreements will commence July 1st, and end June 30th, of each budget year. This agreement may be extended for up to two (2) additional years upon mutual agreement of the parties to the terms and conditions for such extended period.
- **Termination:** Any party may terminate this collaborative agreement for cause after giving a written notice by November 1st of the agreement year. The defaulting party shall have thirty (30) days to cure the default after receiving notice. If the default is not cured during that period, then the non-defaulting party may terminate the agreement. Termination for cause of the agreement prior to the end of the contracted agreement can take place upon agreement of both parties.

- **Over View of Agreement:** South Portland School Department will provide a PMCS (Preventative Maintenance Checks and Services) and Repair Maintenance Program and Administration for the program for selected school buses of Portland Schools. South Portland School Department will also provide a facility for the collaborative repair maintenance program. This service will be provided for a cost per hour rate of \$29.19 hr. South Portland School Department will invoice Portland Schools sixty (60) hours a week for fifty two (52) weeks for labor cost for the duration of the collaborative agreement. If overtime is generated it will be computed on the cost per hour rate. Repair Maintenance parts for Portland Schools school buses are not include in the hourly rate and will be invoiced separately.

Portland Schools will purchase specific specialized shop equipment before the implantation of this agreement for a cost of \$28,957.00.

Whereas Portland Schools and South Portland School Department have established a collaborative environment to define best practices towards meeting the vision of fiscal efficiency, we authorize our Transportation Administration to enter into this collaborative agreement and further plan to identify other Student Transportation areas that best meet the needs of our students and conserve limited tax dollars at the same time.

Richard Carter, Chairperson
Board of Education
South Portland School Department

John Coyne, Chairperson
Board of Education
Portland Schools

Suzanne Godin
Superintendent
South Portland School Department

Jeanne Whynot-Vickers
Superintendent
Portland Schools

This Date Of _____

This Date Of _____

SOUTH PORTLAND COLLABORATION AGREEMENT CALCULATIONS

Cost calculations are based on garage area square footage.

Square Footage of Facility Being Leased = 32,800

Garage Area Square Footage = 60 X 60 = 3,600

3,600 divided by 32,800 = 11%

Lease of Transportation Facility = \$184,640.00 06/07

\$184,640.00 X 11% = 20,310.00

The total 11% was used because Portland would be using the total garage area at one point or another.

Administration Cost = \$6,000

Capital Outlay Cost Breakdown

Bus Lift = \$26,657.00

1 - ¾ inch Air Gun = \$400.00

1 - ½ inch Air Gun = \$300.00

2 - Retractable Drop Cord Lights = \$300.00

4 - 20 Ton Jack Stands = \$250.00

1 - Set of Shelving = \$900.00

1 - Computer Hard Drive Upgrade = \$150.00

COC = \$28,957.00

Estimated Staffing Cost Breakdown

1 Technician 52 weeks 52 X 40 hrs. = 2080 hrs. 2080 X \$15.26 hr. = \$31,741 X 36% benefits = \$11,427
\$31,741 + \$11,427 = \$43,168 **TOTAL = \$43,168**

.5 Technician 52 weeks 52 X 20 hrs. = 1040 hrs. 1040 X \$15.26 hr. = \$15,871 X 36% benefits = \$5,714
\$15,871 + \$5,714 = \$21,585 **TOTAL = \$21,585**

Procurement of Repair Maintenance Facility \$20,310 + Administration cost \$6,000 = **Total \$26,310**

The 1.5 technicians were calculated on 1 technician per 17 school bus units per national standard.

21 Portland school bus units involved in the repair maintenance program.

Final Breakdown Labor Cost

One (1) technician = \$43,168 at 2080hrs. (40 hrs. week 52 weeks)

One half (.5) technician = \$21,585 at 1040hrs. (20 hours week 52 weeks)

Total technician cost = \$64,753 \$64,753 divided by 3,120hrs. = \$20.76hr.

Procurement of repair maintenance facility and administration cost = \$20,310 + 6,000 = \$26,310.

\$26,310 divided by 3,120hrs. = \$8.43

Total Labor Cost per Hour = \$29.19 \$29.19/hour X 60 hours X 52 weeks = \$91,072.80 Annual Cost

Capital Outlay Cost = \$28,957.00 + \$91,072.80 = \$120,029.80 Total First Year Cost

NOTE: There are 21 Portland school bus units involved in the proposed collaborative repair maintenance program. Portland is currently paying O'Connor Motors \$63.00 hr. The implementation of this agreement is contingent upon South Portland School Department hiring an adequate technician for the calculated hourly labor rate of \$15.26.

Total technician cost = \$64,753 \$64,753 divided by 3,120hrs. = \$20.76hr.

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PORTLAND/SOUTH PORTLAND SCHOOL DEPARTMENT SCHOOL BUS FLEET REPAIR MAINTENANCE COLLABORATIVE GOALS

Portland School Department Goals

- To improve the accountability for the repair maintenance of the school bus fleet to ensure the fleet meets all state inspection regulations while creating a safe environment for the transportation of students to and from school and school related activities.
- To collaborate with South Portland to provide a repair maintenance program that will utilize their competitive bid process, physical plant, diagnostics equipment and technical skills to reduce repair maintenance cost.
- To embrace the vision of establishing a collaborative environment with other area schools to improve fiscal efficiency while reducing cost.

South Portland School Department Goals

- To ensure the current repair maintenance program is not affected where the established high standard of the fleet quality and physical plant decreases.
- To ensure the current accountable and harmonious environment for the current repair maintenance program is not compromised.
- To embrace the vision of establishing a collaborative environment with other area schools to improve fiscal efficiency while reducing cost.

Appendix 3

Transportation Department Synopsis

School Bus Magazine nationally recognized the Transportation Services of the Portland Public Schools in October 2002 as one of the "*50 Great Fleets Across America*." In April 2003 the department was recognized by the *U.S. Environmental Protection Agency* and then Director Christie Todd-Whitman for its' leadership in being one of the first school bus fleets to promote the "*Clean School Bus USA Program*." Governor John Baldacci has also awarded the "*Governor's Award for Environmental Excellence*" to the department in 2005 for its' work on reducing diesel engine emissions. July 2006 brought the "*Clean Air Excellence Award*" from the Maine Department of Environmental Protection.

Portland school buses will consume in excess of 50,000 gallons of an environmentally friendly combination of ultra low sulfur / bio-diesel fuel in the majority of our fleet this coming year. Rounding out the effort to protect our students from dangerous emissions, the remaining three units are compressed natural gas school buses, the only such school buses in the state using this particle free fuel.

Transportation Services operates twenty-seven vehicles of all shapes, sizes, and configurations. Carrying 2,300 students on 191 bus routes daily produces approximately 805,000 "*to and from*" school trips annually. Athletic trips and field trips will add an additional 250,000 trips per year. Vehicle mileage will approach 400,000 miles for the current school year. Routes are not limited to Portland, as we currently transport students to outside schools in Auburn, Pownal, Saco, South Portland, and Falmouth.

Transportation Services operates year round, providing necessary services for all summer. While not the largest school bus fleet in the state, the operation is the most technically challenging. Programming Portland such as ELL, Many Rivers, and school of choice, plus an ever increasing special education population has forced creation of a system of "*combination*" runs, seen no where else in Maine. To keep labor costs and vehicle expenses low; two, three, and sometimes four schools (with as many different programs) are assigned to one bus, rather than multiple buses. Portland also takes advantage of its' route length and times to create multiple tiers with as many as six a.m. routes per driver, as opposed to two or three in many transportation operations.

In 1996 Transportation Services became the first school bus organization to purchase software specifically designed for the school bus industry. In the years since it has been an invaluable asset. Used for planning, scheduling, student demographics, redistricting, and routing, it has proved its' worth many times over. The DOE recently recognized the department as being so technologically savvy; it requested our help to write specifications for transportation software being offered by the state to newly forming school district. Most districts in Maine still do utilize this technology.

Appendices

Facilities and Maintenance

New initiatives for Potential Facilities and Maintenance Savings

1. Potential Savings from student grant-funded initiatives at Portland High School and Lincoln Middle School, such as the recent installation of solar panels at the latter.
2. The "electrical energy challenge" is off to a modest start (see attached spreadsheet), but it does have potential if we can educate students/staff to use electricity (especially lighting) prudently and work aggressively to remove "small" appliances from areas where they are not required. If we can reduce consumption by 10% during the two four month challenge periods, we could save up to \$80,000 and re-invest up to \$8,000 (10% of 10%) in programming for the schools that reduce the most.
3. Delamping, replacing exit lights with LED fixtures and aggressive efforts to reduce classroom lighting could reap significant benefits at Portland High (down about 10% from September 2006 to September 2007 - see paragraph 2 spreadsheet). We have replaced clogged heating piping and poorly functioning valves/controls on the heating system at Lincoln Middle School which should result in more even levels of heat, but could also provide operational savings. The City of Portland replaced lighting in the Reiche gym this summer. Though the gym sees extensive use year round, they can shut the lights off between classes and during breaks in scheduled activities.
4. Establishing building hours, scheduling events centrally and setting heating at 68 degrees Fahrenheit (and cooling at 74 degrees Fahrenheit) should allow us to minimize oil consumption and hold costs in check (see details in the paragraph below). However, everyone should be aware of the fiscal impact that escalating fuel costs, increased electrical capacity charges and double digit percent sewer rate increases will have on our bottom line in the years ahead.
5. Energy "savings" are being absorbed by higher energy costs from FY03 to FY07. The electrical rate (combination of CMP and contracted supplier) has increased over 60% and electrical consumption is down almost 8%, but we paid almost 50% more. The oil rate for #2 heating fuel has gone up over 200% and our overall consumption is down over 25%, but our costs are up over 100%. I don't have the specifics on water and sewer, but I know that the rates have gone up while our FY07 water and sewer costs were actually less than FY03. However, I think it is also prudent to note that our physical plant changed dramatically over this same period though the actual square footage was only down about 3% (1,615,846 in May 2003 versus 1,563,721 in August 2006).
6. Over 13,000 lighting fixtures were replaced with more efficient lamps and electronic ballasts; new burners with Autoflame installed at 5 school properties; Network 8000 digital controls established throughout the system; and two new pieces of equipment installed in the kitchen. A new boiler at Sacred Heart and upgraded electrical services at Martin's Point proved less valuable in the long run, but still reaped some benefits. Our

square footage costs for utilities in F06 were significantly less than some of our counterparts across the state (see FY06 SF cost by building attached).

7. Because of the closure of the warehouse and enabled by a local vendor, we are trying to build a custodial products purchasing consortium/collaborative with both municipal and school department representatives from Portland, Westbrook, Windham, Raymond, South Portland (and, possibly USM).

Electrical Consumption by School					
FY 08 to FY07					
February through May - as of end of May 2008					
LOCATION	FY08 KWH	FY07 KWH	KWH DIFF	% DIFF	Comments
BXT	42,900	46,080	-3,180	-7%	
CIS	6,551	6,380	171	2.68%	
CLF	49,840	57,040	-7,200	-12.6%	
DHS	225,600	238,800	-13,200	-5.53%	
EECS	153,200	152,320	880	0.58%	
HLL	78,080	79,120	-1,040	-1.31%	
KMS	103,680	122,080	-18,400	-15.07%	
LMS	126,080	141,280	-15,200	-10.76%	
LNG	49,640	49,840	-200	-0.40%	
LYS	70,021	67,520	2,501	3.70%	
MMS	145,600	159,520	-13,920	-8.73%	
PATHS*	445,865	466,787	-20,922	-4.48%	
PKS	12,720	15,880	-3,160	-19.90%	
PHS	354,400	412,400	-58,000	-14.06%	
PRS	47,800	48,200	-400	-0.83%	
RCH	166,320	164,800	1,520	0.9%	
RVR	300,360	275,520	24,840	9.02%	
TRN	3,283	3,896	-613	-15.73%	
RDW	67,080	72,920	-5,840	-8.01%	
WST	61,560	64,718	-3,158	-4.88%	
Totals	2,510,580	2,645,101	-134,521	-5.09%	
Note 1: CMP reads the meter each month. It is read on different dates so estimates could have an impact.					
* PATHS also includes CBHS and Central Office.					
Note 2: The 134,521 KWH reduction during the first challenge period of 2008 equates to about a \$20,000 cost avoidance (savings) at current blended rate.					

	Electrical Consumption by School				
		FY 08 to FY07			
	Year to date - end of May 2008				
LOCATION	FY08 KWH	FY07 KWH	KWH DIFF	% DIFF	Comments
ADM	0	0	0	#DIV/0!	transferred to City 12/06
BXT	107,550	112,260	-4,710	-4%	
CIS	14,535	12,029	2,506	20.83%	
CLF	128,200	147,400	-19,200	-13.0%	
DHS	589,800	633,300	-43,500	-6.87%	
EECS	406,320	399,480	6,840	1.71%	
HLL	195,200	198,800	-3,600	-1.81%	
KMS	273,920	295,360	-21,440	-7.26%	
LMS	297,760	337,120	-39,360	-11.68%	
LNG	142,080	142,960	-880	-0.62%	
LYS	173,919	171,680	2,239	1.30%	
MMS	354,240	390,560	-36,320	-9.30%	
PATHS	1,132,543	1,146,263	-13,720	-1.20%	
PKS	32,360	37,760	-5,400	-14.30%	
PHS	868,800	1,011,200	-142,400	-14.08%	
PRS	127,640	118,080	9,560	8.10%	
RCH	439,280	438,400	880	0.2%	
RVR	802,560	705,600	96,960	13.74%	
TRN	10,198	11,389	-1,191	-10.46%	
RDW	179,720	191,000	-11,280	-5.91%	
WST	158,301	156,970	1,331	0.85%	
Totals	6,434,926	6,657,611	-222,685	-3.34%	
Note 1: CMP reads the meter each month. It is read on different dates so estimates could have an impact.					
Note 2: The 222,685 FY08 to date KWH reduction equates to just over \$33,000 in cost avoidance (savings)					
at the current blended rate.					

	Electrical Consumption by School				
		FY 08 to FY07			
September through December Comparison - as of October 2007					
LOCATION	FY08 KWH	FY07 KWH	KWH DIFF	% DIFF	Comments
BXT	18,090	19,560	-1,470	-8%	
CIS	1,457	1,168	289	24.74%	electric heat in 08
CLF	25,400	27,960	-2,560	-9.2%	
DHS	116,100	118,800	-2,700	-2.27%	
EECS	67,360	68,000	-640	-0.94%	
HLL	36,480	38,560	-2,080	-5.39%	
KMS	56,800	55,840	960	1.72%	
LMS	53,440	59,520	-6,080	-10.22%	
LNG	30,520	31,360	-840	-2.68%	
LYS	31,744	30,480	1,264	4.15%	
MMS	58,240	62,080	-3,840	-6.19%	
PATHS*	201,153	196,005	5,148	2.63%	
PKS	5,880	6,680	-800	-11.98%	
PHS	137,600	173,600	-36,000	-20.74%	
PRS	25,200	22,520	2,680	11.90%	
RCH	83,760	82,000	1,760	2.1%	
RVR	141,000	117,720	23,280	19.78%	construction/expansion
TRN	2,068	2,104	-36	-1.71%	
RDW	34,520	35,640	-1,120	-3.14%	
WST	25,267	24,263	1,004	4.14%	
Totals	1,152,079	1,173,860	-21,781	-1.86%	
Note: CMP reads the meter each month. It is read on different dates so estimates could have an impact.					
* PATHS also includes CBHS and Central Office.					

		Portland Public Schools					
		Energy Conservation					
		A Time for Change					
		<i>Working Draft - August 14, 2007</i>					
	<u>FY00</u>	<u>FY01</u>	<u>FY03</u>	<u>FY04</u>	<u>FY05</u>	<u>FY06</u>	<u>FY07</u>
Electrical (million kWh)							
Consumption			7.9701	7.8726	7.7139	7.4729	7.3402
Rate *	0.1058	0.1080	0.0937	0.0995	0.1060	0.1358	0.1523
Cost	\$828,745	\$844,722	\$747,046	\$783,638	\$817,615	\$1,015,146	\$1,117,853
Oil (gallons)							
Consumption							
#2	316.19	326.30	414.40	383.74	509.03	492.98	449.99
#4	244.57	241.30	154.59	130.32	83.79	18.44	23.75
#6	121.73	136.40	131.82	117.14	56.32	44.34	50.57
Annual total	682.49	704.00	700.81	631.20	649.14	555.76	524.31
Rates							
#2	0.6862	1.1270	0.7370	0.9041	1.0180	1.7750	2.2884
#4	0.6369	0.9510	0.8419	0.9300	0.9800	market	market
#6	0.5590	0.7600	0.7170	0.8300	0.8300	market	market
Cost		\$667,276	\$542,908	\$596,492	\$697,042	\$994,043	\$1,141,769
Natural Gas (CCF)							
Consumption							
Rate	0.7192						
Cost		\$64,766	\$43,011	\$42,337	\$51,310	\$40,602	\$17,729
Water/Sewer (HCF)							
Consumption							
Rate							
Cost		\$118,166	\$129,811	\$128,683	\$121,990	\$132,134	\$126,825
Total Annual Utility Cost		\$1,694,930	\$1,462,776	\$1,551,150	\$1,687,967	\$2,181,925	\$2,404,176

Appendices

Special Education

Alternative Plan Changes in and Reorganization of Special Education

What we have done: The Portland Public School Department conducted a survey in December 2006 that showed existing regional needs for day treatment programs, students out of school for 45 days, extended school year services, programs for students exhibiting significant anxiety and reluctance to attend school, vocational education, programs for students with autism, assessment for English Language Learners, social groups for students with Asperger's and response to intervention.

The Portland superintendent and director of student support services began meeting with superintendents and special education directors from Cape Elizabeth, Falmouth, Scarborough and South Portland in the spring of 2007. Specifically we met on March 19 and May 16 to discuss a number of regional opportunities.

Within the Portland Schools we have begun discussing the role of the learning strategist. This is a unique position on the teachers' contract that functions as a chairperson and point person for comprehensive special education activities in each building. Each school has a learning strategist either on a half time or full-time basis. A reduction in the number of strategists district-wide from 11.0 FTE to 6.0 FTE would result in an estimated savings of \$420,000. We will continue to have discussions about the feasibility of this reduction and the amount of specialized functions that will fall to special educators, building administrators and school secretaries to assume.

We have also begun discussing opening the West Day Treatment Program to students from surrounding communities. This would provide a low-cost alternative to the special purpose private schools in the area and may therefore save money for sending districts. A West Day Treatment Program description is attached at Appendix A.

Proposal for Cumberland County Regional Educational Assessment and Diagnostic Services (1996)

Introduction: The superintendents and directors of special education in Cumberland County have already initiated a number of conversations concerning regionalized services. Those conversations have led to nascent regionalized activities in transportation and professional development. Given the expanding expenses associated with special education and the new demands placed on school districts by No Child Left Behind, the nature and intensity of these conversations has resulted in a proposal to regionalize specific functions of both regular and special education. This is a proposal to create an educational collaborative in Cumberland County to provide regionalized day treatment, professional development and assessment services.

Overview: Cumberland County provides education for 42,301 students (2003-04, Maine Department of Education) of which 6,389 or 15.1% of those students are identified as special education students. Although the county rate for special education is lower than the state average, it does serve as an indicator of the potential expense of special education costs. Cumberland County is 95.7% white; the average median family income is \$44,048 and only 7.9% of the residents live under the poverty line.

Challenges to be addressed by a regional center: Cumberland County poses a very different set of challenges than less densely populated and less "affluent" areas of Maine. Most of the school districts have well developed special education programs, adequate resources for assessment and the delivery of related services (occupational therapy, physical therapy and speech). Many districts have access to licensed psychological providers and a wide range of consultants in specific disability areas.

The districts are struggling with increased costs, particularly due to an increasing number of students identified on the autistic spectrum and students with increasingly intense levels of emotional and behavioral disabilities. Some districts, such as Portland, have an additional burden due to declining enrollments and the subsequent impact of the state funding formula for general-purpose aid. Communities surrounding Portland are becoming more service center oriented and are noting an increase in the number of students with English as a second language. Therefore a major challenge to regionalization in Cumberland County is the well-developed system for service delivery that already exist and the strong interest in local control.

There are, however, some functions of special education that could be supported and enhanced through regionalized activities. The functions are:

- Programs and services,
- Professional development,
- Transportation, and
- Assessment

Programs and Services:

1. Day treatment level programs for emotionally and behaviorally disabled students currently provided mostly by private, special purpose schools, are over-enrolled and frequently have long waiting lists of eligible students. Students may show signs of serious psychiatric involvement and it can be difficult to secure medication management and counseling services for this population. A regional program would provide less costly and population-based services. Portland already has a day treatment level program, the West Program that could readily be expanded to handle 50 additional students. The program is located at the West School on Douglas Street in Portland and shares this space with part of Portland's large Adult Education Program. If the program were regionalized then Adult Education would have to be re-located.
2. The development of a regional alternative high school program would result in reduced dropout rates across the county, and fewer referrals for out-of-district placements.
3. Transporting students to out-of-district placements is an area that is ripe for regionalization and cost sharing. In fact, Westbrook, South Portland and Portland are already sharing some transportation routes.
4. Purchasing in large quantities is always more cost-effective. The region could centralize purchasing of items specific to education, such as office supplies, some educational materials and office equipment.

Professional development:

1. Consultation for specialized populations, especially on the autistic spectrum is an enormously expensive service and one that is frequently dictated by PETs. The aim of consultation is to develop better programs for students and also to increase the capacity of the staff to deal with the students. The other obvious expertise in Portland is around English language learners and interpretation/translation services.
2. Development of staff trained in applied behavioral analysis (ABA techniques) and language/social pragmatics is increasingly necessary in developing programs and delivering services to students on the autistic spectrum. Training staff in this area and providing additional countywide consultants would be effective ways to reduce costs to individual school districts. Woodfords currently has several staff trained in ABA and behavioral programming, which districts utilize through contracts. Additional access to consultation and possibly even educational programming for ELL (like the newcomers program) should be investigated.
3. Staff Development is always open to additional resources and sources of information. Inviting a nationally known speaker for a workshop and sharing the cost among districts has happened infrequently in the past but has always generated interest. For example several districts have provided expensive training from LindamoodBell and invited other districts to share the cost. This is been advantageous to all districts and provides additional staff development

opportunities. Differentiated instruction is another proposed professional development topic that is germane to both general and special education staff.

4. Educational programs for ed techs to meet the standards of NCLB and programs to assist teachers to meet the highly qualified standards could be explored. We already have connections with USM and UNE; other college and university collaborations are also possible (such as offering a Masters Program through Simmons College for example).
5. Identification and eligibility issues lie at the heart of increasing numbers of students identified as requiring special education services. This area should not be confused with the growing numbers of students identified on the autistic spectrum.
6. Information on students with Asperger's and other forms of high-functioning autism needs to be delivered especially to general educators.

Assessment:

1. Parents and advocates frequently request neuropsychological evaluations. The psychologists providing neuropsychs in the area are not always cognizant of educational issues and their reports are often catalysts for due process. A regionalized system that employed PhD level psychologists could provide this assessment at a less costly rate.
2. ESL evaluations for students with language issues and suspected special education concerns are difficult to achieve. As the multi-linguistic populations spread out from Portland, the need for interpreting, translating and language-awareness is increasing.
3. It is sometimes impossible to access psychiatric and neurological services for students. A regional center could provide better access to these specialized assessments, which are sometimes dictated by PETs and that sometimes require trips to Boston.

Description of the Cumberland County Regional Educational Assessment and Diagnostic Services CCREADS):

Functions:

1. Recruit and schedule consultants and unique service providers
2. Recruit professional development presenters
3. Recruit clinicians to provide "neuropsychological" evaluations and other specialized assessments
4. Provide a clearinghouse for translations and interpreters
5. Schedule professional development activities
6. Develop a course for ed techs towards standards
7. Develop courses for special educators in conjunction U.S.M and U.N.E.
8. Develop a day treatment program, grades 1-12
9. Develop regionalized transportation
10. Set up regionalized purchasing agent; warehouse; delivery system
11. Function as county-wide resource for questions and advocacy

Staffing:

1. One staff person to assess the county and begin initial start-up of activities
2. Eventually additional staffing might be required for a program administrator and clerical support.

Funding:

1. Staffing and all functions will be billed to member districts as a membership fee. Districts would pay tuition to any student programs accessed but would not pay to access any other services professional development or other organizing activities, such as transportation or purchasing.

Governance:

1. District superintendents will function as the Board of Directors.
2. District directors of special education will form a Middle Management Committee.

Start-up activities during the 2006-2007 school year:

- Direct expansion of the West program into the Cumberland County Regional Day Treatment Program (covering grades 1-12), with students entering in September 2007.
- Regionalize West by adding two teachers and four ed techs for an IAEC (45 day placement for students with sudden and significant behavioral issues). Set up two classrooms and open enrollment for middle and high school students.
- Assess Cumberland and York county needs for day treatment services; consultation; assessment and other issues.
- Conduct an assessment of professional development needs in county districts; Assess county administrators regarding professional development needs; create professional development offerings for SY 2007-2008

- Develop a list of professional development resources and presenters; assess professional expertise in member districts
- Conduct an assessment of transportation needs
- Conduct an assessment of purchasing needs
- Assess availability of grant and additional state funds to support some of the program costs
- Assemble the data and provide a report to the superintendents and directors of special education before April 1, 2007. The report will be a specific blueprint and budget document for setting up the CCREADS center, to start operations in August 2007
- Locate space for offices and professional development activities

Budget Proposal:

- \$60,000 Funding for 1.0 FTE professional staff (includes salary, benefits, professional development and mileage)
- Office space, equipment, phone, copying, internet access provided as in-kind services from cooperating districts

Program Overview

The West School Day Treatment Program has been providing high quality services to Portland Public Schools students since 1999. This unique program has enabled scores of Portland children with emotional disabilities and/or mental health diagnoses to have their needs successfully addressed within their home community, instead of being referred to out-of-district programs.

West's mission with all its students is to provide a safe and nurturing environment to prepare them academically, socially, emotionally, and behaviorally to transition to, and be successful in, their neighborhood schools. Achieving this mission involves creating an individualized program for each student, developed by a team consisting of parents/guardians, neighborhood school staff, school district specialists, community providers, and the student's classroom-based Learning Team at West School.

West offers specialized educational instruction in accordance with local, state, and federal guidelines and mandates. A student's Individual Educational Plan (IEP) guides their academic instruction, while their Individual Service Plan (ISP) drives their treatment. West School provides all its students with a therapeutic environment; throughout the school day, in all school settings and activities, we are working with children to help them successfully achieve their treatment and learning goals. Helping a child develop positive, pro-social coping skills involves a process that takes a considerable time and patience. The highly skilled and dedicated West staff provides students and their parents with an extraordinary web of support that promotes the positive changes necessary to transition a child back to their neighborhood school.

Referral to the West School Day Treatment Program is made through the IEP Team in a child's home school, and only after all building-based options and interventions have been exhausted. The West Program also offers a limited number of short-term diagnostic and assessment placements through its Interim Assessment Educational Center (IAEC).

School Program Highlights

The West School Day Treatment Program serves the Portland Public Schools. West School provides day treatment-level services to Portland students in grades 1-12. Day treatment services represent an integration of therapeutic and educational programming designed to support children who have been identified with significant social, emotional, or mental health issues that adversely affect their learning and access to the general curriculum.

Staff Training

West School's greatest resource is its staff. West School staff are highly trained to meet the needs of the behaviorally challenging students they work with. Classroom and clinical staff are certified in Therapeutic Crisis Intervention (TCI), an intensive 24 hour training program that focuses on the prevention, de-escalation, and containment of high level behavior. On-going staff development provides the staff with the professional edge they need to address the ever-changing needs of their students.

Learning Team Model

West School has developed a strong Learning Team model that provides team members the individual and collective support they need to enhance staff resiliency, facilitate effective communication, and collaboratively address the complex needs of their students. All Learning Teams practice the attributes of high-performing teams: daily pre-briefings and debriefings, equality of voice, and effective feedback structures. Learning Teams adhere to site-developed Norms of Communication.

Classroom Model

All West School classroom programs are unique, but share some common structures. Each classroom, with its very low student-to-staff ratio, employs an individualized daily system for measuring a child's progress toward their identified goals. This information is communicated to the child's home every day, not unlike a daily report card. Student progress is discussed regularly by the Learning Team and graphed more formally on a monthly basis. All classrooms employ a comprehensive behavior management approach to facilitate positive social skills development. Secondary classrooms use a Level System model that emphasizes student responsibility and accountability for behavior.

Clinical Model

The West School clinicians, school nurse, psychological staff, and other specialists provide a thorough array of treatment services for West students. Social workers provide students with individual counseling on a weekly basis. Pro-social coping skills classes are facilitated weekly by social workers in all classrooms, and these skills are reinforced throughout the week by the classroom staff. Social workers provide comprehensive case management services to their students based on their needs. West's psychologist conducts comprehensive student assessments, provides consulting services, and leads clinical professional development activities for West staff. The school nurse manages all aspects of psychotropic medication management, mental health related medical issues, and coordinates the activities of the Multidisciplinary Team.

Parents as Partners

Parents and guardians play an integral role in their child's treatment at West School. We believe no one knows a child better than their family. The West School staff values and expects parental input and involvement in their child's individual treatment program. The staff provides parents and guardians with many opportunities to work with them in helping their child achieve specific treatment and learning goals. Over the years, a direct, positive correlation has been shown between the level of parental involvement and a child's response to treatment.

Community Services

West School strives to provide its students with seamless services. Toward this end, West staff advocates for student access to community-based case management services, counseling support, mental health services, and in-home supports as needed. Over the years, West School has developed strong, collaborative working relationships with a vast array of community service providers to enhance this seamless service model of support. In-house, in collaboration with Portland Public Health, West provides a free clinic for check-ups, sick care, immunizations, dental cleanings and screenings, as well as referrals to other medical resources.



STATE OF MAINE
DEPARTMENT OF EDUCATION
23 STATE HOUSE STATION
AUGUSTA, MAINE
04333-0023

JOHN ELIAS BALDACCI
GOVERNOR

SUSAN A. GENDRON
COMMISSIONER

April 2, 2008

APR - 4 2008

Jeanne Whynot-Vickers, Interim Superintendent
Portland Public Schools
196 Allen Avenue
Portland, ME 04103-3799

Dear Superintendent Whynot-Vickers:

Thank you for your letter dated March 25, 2008 in which you provided an update on the status of the Alternative Plan for Portland Public Schools. You also requested an extension for the submission of your plan to June 13, 2008.

I hope that once the Legislature acts on the legislation related to P.L. 2007, Chapter 240, Part XXXX, you will resume work on your alternative plan. Please submit your Alternative Plan Submittal Sheet, Alternative Plan Cover Sheet (checklist), and revised Alternative Plan by Friday, June 13, 2008.

In the meantime, if you have questions or concerns, I encourage you to contact Ray Poulin or Norm Higgins of our Reorganization Team. They may be reached by phone at 624-6802.

Sincerely,

Susan A. Gendron
Commissioner of Education

PORTLAND PUBLIC SCHOOLS

Personal Vehicle Use Checklist

Although the district discourages the use of private vehicles to transport students, we understand that at times it is necessary to do so. We must be advised when such a plan of transportation is to take place. To assist us in managing this process, please answer the following questions before transporting students in your private vehicle.

What dates(s) are you planning to transport students? _____

What is the reason you are providing transportation? _____

How many students are you planning to transport? _____

What vehicle/passenger capacity will you be using to transport? _____

Does your vehicle have a current valid inspection sticker? Yes ☐ No ☐

Does your vehicle have a current valid registration plate? Yes ☐

No ☐

Is your vehicle insured? Yes ☐ No ☐

If yes, what is the liability limit you carry? \$ _____

Do you currently hold a valid State of Maine drivers license? Yes ☐ No ☐

Is your privilege to drive currently under suspension? Yes ☐ No ☐

Have you obtained parental permission slips from all students you are planning to transport? Yes ☐ No ☐

* Please note in the event of an accident and subsequent claim, your insurance company will likely deny the claim because of the business use of your vehicle and file against the district's insurance company.

Signature of Employee/Volunteer

We thank you for your assistance. Please feel free to call the Finance Office (874-8125) with any questions you may have.

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